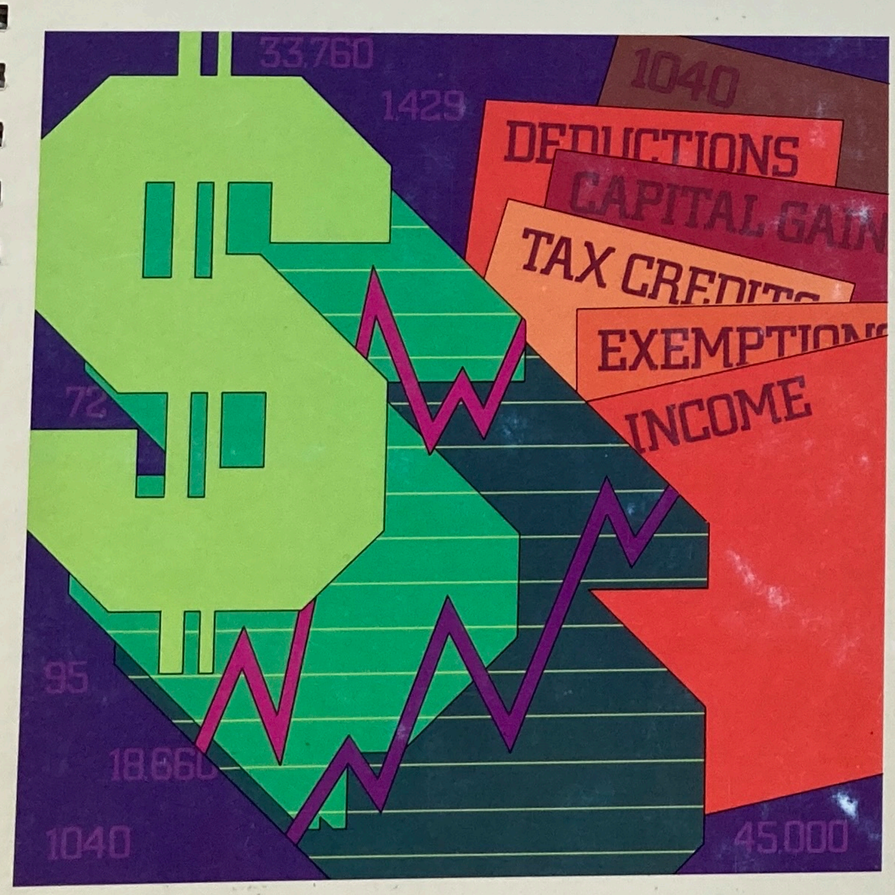
Apple II

Tax Planner™

Reference Manual



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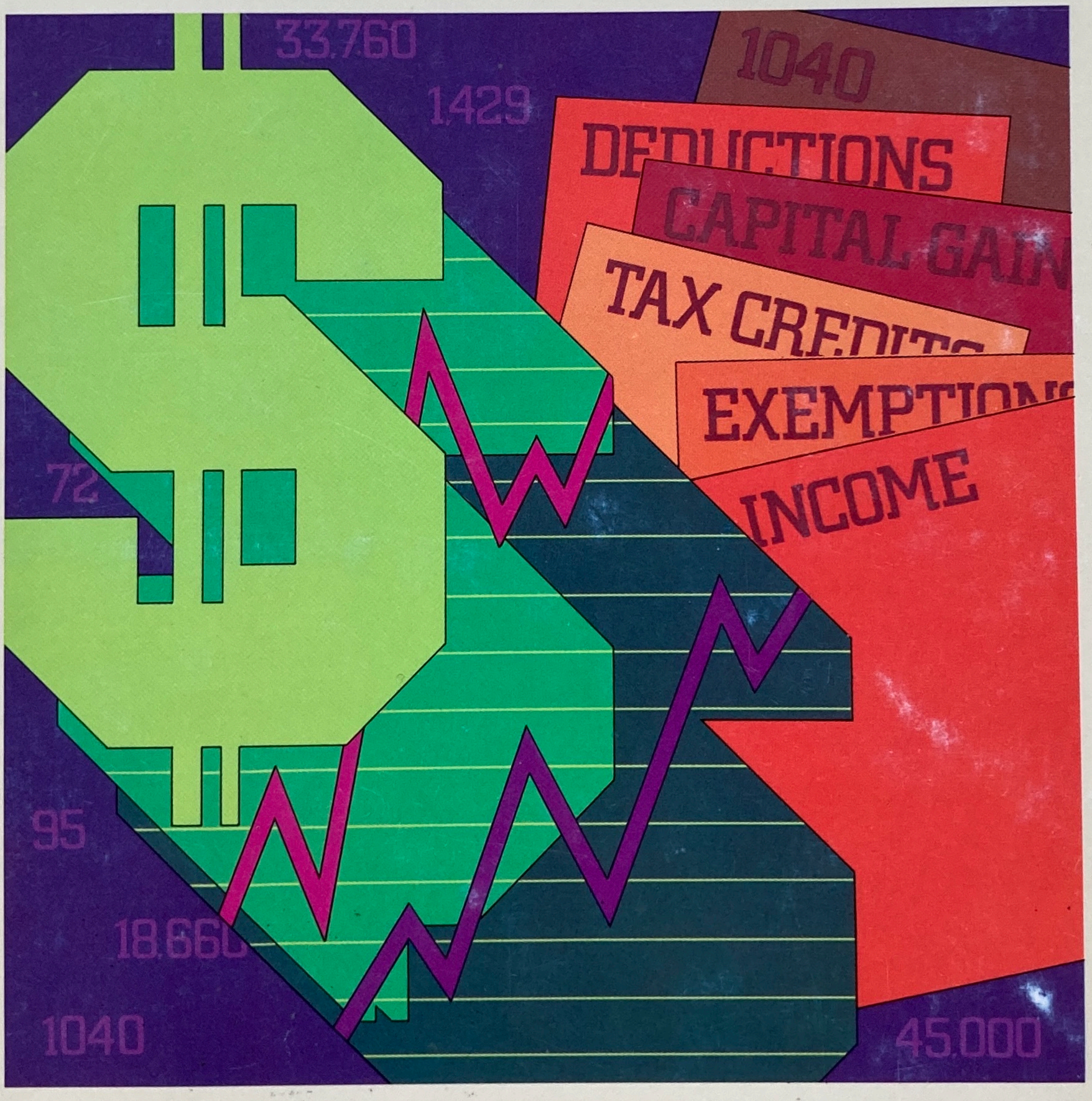

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JOHN V. WEBER

BACKUP

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REFERENCE SUMMARY

This list contains a summary of the references mentioned in the text and on the help screens for each subject. IRS publications need not be your only source of information; you may also wish to consult your tax advisor.

Subject	Reference
FILE STATUS	Appendix B Instructions for IRS Form 1040 "Your Federal Income Tax"
EXEMPTIONS	Instructions for IRS Form 1040 "Your Federal Income Tax"
INCOME	
-PERSONAL SERVICE	Form 4726 - "Maximum Tax on Personal Service Income" IRS Publication 525 - "Taxable and Non-Taxable Income"
-SHORT TERM GAIN	Schedule D (Form 1040) Instructions for IRS Form 1040 "Your Federal Income Tax" Form 4797 - "Supplemental Schedule of Gains and Losses"
-LONG TERM GAIN	Schedule D (Form 1040) Instructions for IRS Form 1040 "Your Federal Income Tax" Form 4797 - "Supplemental Schedule of Gains and Losses"
-ALL OTHER	Schedules B, C, E, and F (Form 1040) Instructions for IRS Form 1040 "Your Federal Income Tax" Form 4831 - "Rental Income" Publication 550 - "Tax Exempt Interest"
ADJUSTMENTS	Instructions for IRS Form 1040 "Your Federal Income Tax" Form 3903 - "Moving Expense Adjustment" Form 2106 - "Employee Business Expenses"
DEDUCTIONS 1	Schedule A (Form 1040) Instructions for IRS Form 1040 "Your Federal Income Tax"
DEDUCTIONS 2	Instructions for IRS Form 1040 "Your Federal Income Tax" Schedule A (Form 1040) Publication 550 - "Investment Income and Expenses" Publication 535 - "Business Expenses" Publication 508 - "Educational Expenses" Publication 587 - "Business Use of Your Home" Publication 334 - "Tax Guide For Small Businesses" Publication 502 - "Medical and Dental Expenses"
PREFERENCE ITEMS	Form 4625 - "Computation of Minimum Tax - Individuals" Publication 525 - "Taxable and Non-Taxable Income" Instructions for IRS Form 1040
TAX CREDITS	"Your Federal Income Tax" Form 2441 - "Credit for Child and Dependent Care Expenses" Form 3468 - "Computation of Investment Credit" Form 4874 - "Credit for Work Incentive (WIN) Program Expenses" Form 5884 - "Jobs Credit" Form 5695 - "Energy Credits" Form 1116 - "Computation of Foreign Tax Credit" Form 4136 - "Computation of Credit for Federal Tax on Gasoline, Special Fuels, and Lubricating Oil"
TAX - REGULAR	Schedules X, Y, or Z
- INCOME AVERAGING	Schedule G
- MAXIMUM	Form 4726 - "Maximum Tax on Personal Service Income"
- PREFERENCE	"Your Federal Income Tax" Form 4625 - "Computation of Minimum Tax - Individuals"
- ALT. MINIMUM	"Your Federal Income Tax" Form 6251 - "Alternative Minimum Tax for Individuals"